

REQUEST FOR PROPOSALS

FOR

Performance Contract for School Energy Conservation

And

Infrastructure Improvements

Issue Date: May 29, 2014

Proposal Due: June 30, 2014 at 2:00 p.m.

New Holland-Middletown ESD #88

75 1250th Street

Middletown, IL 62666

NOTICE TO RESPONENTS:

1. We are submitting herewith for your consideration an invitation to respond to a proposal covering Performance Contract for Energy Conservation and Savings Measures
2. Please note that proposals must be SEALED and addressed to New Holland-Middletown ESD #88, 75 1250th Street, Middletown, IL 62666.
3. Please note that proposals must be on file in the Superintendent's office no later than 2:00 p.m., June 30, 2014; bids received after the date and hour specified will be rejected.
4. Proposals will be opened and publicly read on the date and hour specified. Award, if any, will be made as soon thereafter as possible.

NEW HOLLAND-MIDDLETOWN ESD #88, 75 1250th Street, Middletown, IL 62666

1. Proposals will be in accordance with said article 105 5/19b requirements.
2. The New Holland-Middletown ESD #88 reserves the right to accept or reject any or all bids, to waive any technicality in any bid submitted, and to accept any part of bid deemed to be in the best interest of the District.
3. Proposal shall be firm for acceptance for thirty (30) days from date of bid opening.
4. The New Holland-Middletown ESD #88 and all its agencies are exempt from payment of all federal excise and all state and local sales taxes. Such taxes shall not be computed or quoted as part of the bid.
- 5.
6. The New Holland-Middletown ESD #88 reserves the right to cancel any purchase order or contract for failure of the contractor to comply with the terms, conditions, and specifications of this inquiry.
7. New Holland-Middletown ESD #88 is not liable for any costs incurred in replying to this request. All proposals become the property of the district and are public records.
8. The District plans to select the most qualified provider for the purpose of negotiating a final contract. A Letter- of Intent will be issued to the selected qualified provider as soon as possible.
9. No due date extensions shall be granted.
10. In accordance to 105 ILCS 5/19b-5, New Holland-Middletown ESD #88 discloses that GRP. has assisted in preparing the specifications listed in the RFP.

Section I. Overview

New Holland-Middletown ESD #88 (hereinafter referred to as Owner or District) is seeking proposals from interested companies (hereinafter referred to as Respondent) capable of implementing a comprehensive facilities infrastructure replacement program and sustainability strategies that maximize funding sources in a phased approach for all facilities in the district. The program should include “Energy Conservation Measure” which means any improvement, repair, alteration, or betterment of any building or facility owned or operated by a school district or any equipment, fixture, or furnishing to be added to or used in any such building or facility that is designed to reduce energy consumption or operating costs, and may include, without limitation, one or more of the following:

1. Insulation of the building structure or systems within the building.
2. Storm windows or doors, caulking or weather stripping, multi-glazed windows or doors, heat absorbing or heat reflective glazed and coated window or door systems, additional glazing, reductions in glass area, or other window and door system modifications that reduce energy consumption.
3. Automated or computerized energy control systems.
4. Heating, ventilating, or air conditioning system modifications or replacements.
5. Replacement or modification of lighting fixtures to increase the energy efficiency of the lighting system without increasing the overall illumination of a facility, unless an increase in illumination is necessary to conform to the applicable State or local building code for the lighting system after the proposed modifications are made.
6. Energy recovery systems.
7. Energy conservation measures that provide long-term operating cost reductions.

The Owner intends to award a negotiated contract to one firm to provide the services and/or equipment under terms and conditions considered most favorable among those submissions offered. All interested firms may respond to the RFP.

The Owner reserves the right to evaluate previously completed contract installations at the locations provided as referenced by the firm.

Required Experience and Qualifications

The following are the minimum qualifications required to respond to this RFP:

1. Engineering and technical support staff that will be directly engaged in this project must possess training and experience specific in current technical practices and techniques in the field of utility cost reduction, building operations and sustainable practices. Engineering services must be available in the field of heating, ventilating, and air conditioning systems, interior and exterior lighting, integrated HVAC and lighting control systems, domestic and heating water delivery system, utility service cost control, maintenance plans and execution, customer service, training and project commissioning. Respondent should have a minimum of 10 completed performance contracting projects within the last five years in Illinois Schools that can demonstrate the vendor's ability and skill in establishing and maintaining mutually beneficial partnerships with customers.
2. Responding company must provide repair services available twenty-four (24) hours a day and have a service office located with-in Illinois.
3. Respondents company must employ a Professional Engineer, licensed in the State of Illinois

The following information shall be included in the response to the RFP.

Standard Contract Information

This RFP does not obligate the District to perform until a letter of intent or contract is signed and approved by both parties. Once there is written approval, it is effective from the date of written approval by the District. The Owner shall not be responsible for work done, even in good faith, prior to approval of the letter of intent or contract. The selected respondent will be required to assume total responsibility of the project. The selected contractor will be considered the prime contractor and the sole point of contact with regard to all contractual matters.

Point of Contact

For additional information regarding this document, please contact:

Mr. Todd Dugan, Superintendent

New Holland-Middletown ESD #88

75 1250th Street

Middletown, IL 62666

Phone 1-217-445-2421

Any communications such as regarding matters of clarification must be made to the contact person listed above. Clarifications regarding the request for proposal process, timeline, submission requirements can be directed to the Superintendent at the above address.

Section II. Submittal Requirements

General

Respondents shall submit three copies of their RFP submission. Sealed submissions must be received on or before June 30, 2014 at 2:00 p.m. Submissions received thereafter will be disqualified and returned unopened. Sealed submissions should be delivered to the following address:

Mr. Todd Dugan, Superintendent

New Holland-Middletown ESD #88

75 1250th Street

Middletown, IL 62666

Submittals must be clearly marked on the package ""Response to Performance Contract Request for Proposals". Submissions that are incomplete, do not follow the requested format, or are otherwise contrary to the guideline of this RFP, may be rejected as non-responsive.

Pre-Bid Meeting

A mandatory pre-bid meeting will be held on June 10, 2014 at 10:30 a.m. at the District Office located at 75 1250th Street, Middletown, IL 62666. This will provide an opportunity for respondents to tour the buildings and ask questions.

Preparation of Submissions

RFP submissions must be complete and correct in format. Clear and concise submissions are required rather than elaborate promotional materials. The Respondent is expected to respond to all items in as much detail as necessary for the District and its resources to make an objective evaluation of the RFP responses.

Proprietary Data

Submissions and any other information submitted by Respondent in response to this RFP shall become the property of the District. Respondent must clearly identify any proprietary information that the contractor does not want disclosed to the public. The District and their consultants for the purpose of evaluation and contract negotiations will use data or information so identified. Disclosure of any proprietary information by the District shall be in accordance with the laws and regulations regarding disclosure in force in the State of Illinois.

Right to Reject

The District reserves the right to accept in part or in whole any Submission, waive any formalities, or minor technical inconsistencies or delete any item/requirements from the RFP or resulting contract when deemed to be in the District's best interest.

Cost of Submission Preparation

The District will not provide compensation to the Respondent(s) for any expense incurred by the Respondent(s) for Submission preparation, product evaluations, or demonstrations that may be made.

Evaluation and Selection Procedures

The District has appointed a selection team to formally evaluate each response. The evaluation process will include verification of references of projects, project team members, and may include other information as deemed important by the District.

The RFP submissions will be evaluated. The selection process steps involve:

Responses will be evaluated based on the quality and completeness of the information provided. Failure to provide any of the requested information may result in disqualification. The criteria listed in this RFP will be used in the evaluation of the written proposals, client references and responses of the ESCO finalist during oral interviews, as appropriate.

Section III. Proposal Format and Contents

Proposal Format

Request for Proposals (RFP) submissions must be submitted in the format outlined in this document, referencing each respective section being addressed. The District reserves the right to eliminate from further consideration any response deemed to be substantially or materially nonresponsive. The intent is that all RFP's follow the same format in order to evaluate each fairly.

The response to the RFP shall be submitted in a three-ring or spiral-bound binding with specific tab sections as listed below. A further clarification of the contents for each of the sections follows the tab listings.

☞ Table of Contents

☞ Executive Summary

☞ Section I - Experience and Qualifications

☞ Section II – Technical Approach

☞ Section III – Project Management Process

☐ Section IV - Financial, Costs and Performance Guarantee

☐ Service Approach –Service and Training Available

Table of Contents

Request for Proposals shall include a table of contents properly indicating the section of the information included.

Executive Summary

Request for Proposals shall include a concise abstract stating the respondent's overview of the company. Please summarize the scope of services that would be offered by your firm for this project.

Experience and Qualifications (Section I)

Section I should provide an overview of the organizational philosophy for approaching this project. Include an organizational vision or mission statement if they have been developed, adopted and embraced by the Respondent.

A. Firm Profile: Provide general information on the responding firm, including: name, business address, local telephone number, officers of the firm, and contact person(s) for this project. Provide the year the Respondent's firm was established, and former firm name(s) if applicable. If the firm is a separate legal entity from a manufacturer, for example a distributorship or manufacturer's representative or engineering firm, specify the legal business classification of the responding firm, if any.

B. Respondent's Team Information: Provide resumes that identify the employees of the Respondent's firm that would work on the project. Specify the team members any other pertinent information shall be included for each member of the Respondent's project team. If the Respondent has more than one office involved with the project, indicate the total number of employed full-time personnel.

C. References: Provide a minimum of ten Performance Contracting references for projects of similar size, scope, and complexity located in Illinois within the past 3 years. Each reference shall describe the services provided, project cost, savings amount and benefits to the Owner. Provide the Reference's name, address, current telephone number, and contact person for each reference. Provide a brief description of the projects. Identify any awarded grant money or funding provided outside of energy savings. List only references where your company was the prime Energy Service Company that provided an energy guarantee and not a subcontractor.

Technical Approach (Section II)

A. Project Overview: Describe your findings and solutions to the project. Include a description of your firm's energy conservation measures and provide any detail you feel important for the District to know. Address the means and methods by which your solutions can be introduced to the project. Describe your approach to engineering and design of your project.

Project Management (Section III)

A. Briefly describe your project management philosophy. Include any specific responsibilities, lines of communication, authority of the Respondent's management to control projects, typical procedures for identifying problems and preventing schedule setbacks and cost overruns.

B. Include a project timeline showing schedules for implementation of the project.

Financial Approach, Costs and Performance Guarantee (Section IV)

A. Project Financials: The Respondent shall provide the cost and savings (Energy, and Operational) for the respondents proposed project.

B. Energy Savings Calculations: The Respondent shall describe in detail their approach to projecting the energy savings. Describe the methodology and processes used to project energy savings. Provide all procedures, methodologies and formulas you will use to calculate energy savings.

C. Operational Savings the Respondent shall describe their approach to projecting operational and maintenance savings.

D. Financing Approach: Describe the financing mechanisms, including sources and types of financing that could be used to finance improvements and maintenance operations over the term of the contract. Respondents shall be willing and able to facilitate the financing for this project in accordance with all-applicable Federal, State and Local Laws.

E. Bonding References: Provide the following information concerning your Company's bonding: Name of bonding agent and contact information.

Service and Training (Section V)

Describe the Respondent's approach to operations and maintenance. Include capabilities of the Respondent for servicing HVAC equipment, procedures for handling emergencies. Provide detailed information on training programs available to maintenance staff.

Section IV. Evaluation and Timeline

Each response will be reviewed prior to the selection process for completeness and adherence to the format. Each submission should be prepared simply and economically, providing a straightforward, concise description of the Respondent's ability to meet the requirements of the RFP. The executive summary of each response will be read to give an overview.

Respondent Selection

The evaluation process will include verification of references, Project Team members; confirmation of financial information may include other information as deemed important by the District. The District intends to select no more than two (2) ESCOs as finalists, and will determine if necessary to hold

interviews. Upon completion of the evaluation process the District will then enter into a formal performance contract with the selected Respondent.

Timeline

Requests for Proposals advertised May 29, 2014

Mandatory Pre-bid meeting June 10, 2014 at 10:30 a.m. in the District Office

RFP response due June 30, 2014

Selection of vendor July 7, 2014

Contract Ratification July 16, 2014